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ABSTRACT

This task analysis for positions at the Claretian Medical Center in southeast Chicago was developed to improve communication and customer service in the workplace. The task analysis was prepared through clinic tours, employee interviews, and supervisor questionnaires. It is used for the purpose of curriculum development for onsite instruction in the following areas: interpersonal communication; Spanish for health care workers; customer service; conflict resolution; medical terminology; team development; reading and writing at work; and mathematics skills at work. The task analyses include information about workers in reception, medical services providers, medical records, laboratory, homeless program, and developmental disabilities programs. Duties and tasks are included for such job titles as the following: switchboard operators, greeters, appointment clerks, cashiers, medical interviewers, financial interviewers, referral and recall persons, medical records clerks, triage registered nurses and licensed practical nurses, pediatrics and family practice providers, nutritionists, social workers, perinatal nurses, perinatal clerks, medical assistants, laboratory technicians, phlebotomists, coordinators, clerks, social workers, medical assistants, physician assistants, family nurse practitioners, women's health nurse practitioners, office managers and clerks, office clerks, case coordinators, accounts receivable clerks, accounts payable clerks, payroll clerks, bookkeepers, and data entry clerks. Task analyses include duties and tasks the worker may perform, and language, vocabulary, reading, writing, problem-solving, and mathematics skills needed for each occupation. (KC)

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ED 425 292

Claretian Medical Center
TASK ANALYSIS

WORKER EDUCATION PROGRAM

Chicago Teachers' Center of
Northeastern Illinois University
and the
Union of Needletrades, Industrial,
and Textile Employees

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ED 377509

Overview

CLARETIAN MEDICAL CENTER provides comprehensive high-quality health care to the residents of the far southeast side of Chicago at two clinic sites. It employs over 150 people full- and part-time, who are members of the Union of Needletrades, Industrial, and Textile Employees.

The major departments include Reception, Medical Services Providers, Medical Records, Laboratory, Homeless Program, and Developmental Disabilities Program. Employees have a wide variety of educational backgrounds, demographics, and work experience. In almost all of the positions in each department, individual employees are uniquely linked to their particular job and rarely do they fill someone else's position. For that reason, very few employees are cross-trained to fill the duties of another person's job.

The Worker Education Program implemented at Claretian Medical Center has been initiated to help improve communication and customer service in the workplace. The nature of the health care environment calls for special attention to confidentiality, mutual respect, clear communication, and a professional demeanor. The Worker Education Program plans to provide on-site instruction in the following areas:

Interpersonal Communication
Spanish for Health Care Workers
Customer Service
Conflict Resolution
Medical Terminology
Team Development
Reading and Writing at Work
Math Skills at Work

This task analysis was prepared through clinic tours, employee interviews, and supervisor questionnaires. It will be used for the purpose of curriculum development for the class offerings listed above.

Reception

2) Switchboard Operators
2) Greeters
2) Appointment Clerks
2) Cashiers
2) Medical Interviewers
2) Financial Interviewers
2) Referral/Recall persons

SWITCHBOARD OPERATOR

Duties & Tasks

- answer incoming calls
- connect caller with appropriate person
- page staff as they receive calls
- operate 120-port switchboard

Skills needed to perform Switchboard Operator's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- answer telephones
- ask questions in English or Spanish to determine why caller is calling
- translate for Triage nurses

PROBLEM SOLVING

- use a variety of communication skills to determine where to route the call
- know what questions to ask to route call appropriately
- communicate in a sensitive, empathic manner to people in distress

GREETER

Duties & Tasks

- finds out why persons have come to the clinic
- pages staff members who have visitors and patients

Skills needed to perform Greeter's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask patients if they have an appointment and with whom
- page on p.a. system

READING

materials to be read include:

- appointment book

reading skills needed include :

- read days, times, and names

PROBLEM SOLVING

- communicate in a sensitive, empathic manner to people in distress

APPOINTMENT CLERK

Duties & Tasks

- make appointments for patients over the phone and in person

Skills needed to perform Appointment Clerk's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask questions about availability of patient and provider

READING

materials to be read include:

- appointment book

reading skills needed include :

- reading days, times, and names

WRITING

materials to be written include:

- dates and times in appointment book

PROBLEM SOLVING

- know when it is feasible to overbook appointments
- communicate in a sensitive, empathic manner to people in distress

CASHIER

Duties & Tasks

- collect payment or partial payment for services rendered

Skills needed to perform Cashier's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- inform patient of amount due for medical services

READING

materials to be read include:

- patients' bills
- financial information

reading skills needed include :

- reading numbers and amounts

WRITING

materials to be written include:

- billing forms
- receipts

MATH

- figure percents for partial payment patients

COMPUTER

-use computer program to input billing and collection information

PROBLEM SOLVING

- communicate in a sensitive, empathic manner to people in distress

MEDICAL INTERVIEWER

Duties & Tasks

- find out patients' medical history, demographic information, and who referred them
- fill out patient information forms to begin patient charts
- inform patients of appointments at other sites

Skills needed to perform Medical Interviewer's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask questions about medical history, family history, and demographic information
- call patients to pick up their appointment slips

READING/WRITING

materials to be read and written include:

- patient information forms

reading and writing skills needed include :

- reading days, times, and names
- filling out forms and documents

PROBLEM SOLVING

- communicate in a sensitive, empathic manner to people in distress

FINANCIAL INTERVIEWER

Duties & Tasks

- determine patients' ability to pay for medical services

Skills needed to perform Financial Interviewer's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask questions about patients' financial situation

READING/WRITING

materials to be read include:

- bills, descriptions of services
- financial papers

reading and writing skills needed include :

- filling out forms that determine patients' ability to pay

MATH

math skills needed include:

- figure percentage on sliding scale

PROBLEM SOLVING

- communicate in a sensitive, empathic manner to people in distress

REFERRAL/RECALL

Duties & Tasks

- refer patients to other labs or providers for services not available at CMC
- make appointments over the phone and in person
- follow up on appointments and treatments
- maintain documentation of referrals
- maintain relationships with other medical providers throughout the city

Skills needed to perform Referral/Recall person's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask questions about availability of patient and provider
- listen to type of services needed
- give directions and addresses to patients going to other sites
- communicate with CMC medical care providers about necessary treatment for patients

READING

materials to be read include:

- patient charts
- maps and addresses

reading skills needed include :

- reading days, times, names and numbers

PROBLEM SOLVING

- communicate in a sensitive, empathic manner to people in distress

Medical Records

2) Supervisors
10) Medical Records Clerks

MEDICAL RECORDS CLERK

Duties & Tasks

- pull patients' charts for the next day's appointments
- collect charts from throughout clinic to re-file
- examine each chart for completeness and correct order
- re-file complete charts
- return incomplete charts to physicians for completion

Skills needed to perform Medical Records Clerks duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- find out from appointment clerk which charts to pull for the next day
- ask questions about work to be done

READING

materials to be read include :

- medical records, forms and documents
- color and alphanumeric codes

reading skills needed include:

- reading names
- matching codes

PROBLEM SOLVING

- figure out where a missing chart may be located throughout the clinic
- prioritize work load
- organize work load and office space
- facilitate physician's completion of patient charts

Medical Services Providers

4) Triage RN's
2) Triage LPN's
24) Pediatrics and Family Practice providers
2) Nutritionists
2) Social Workers
2) Perinatal Nurses
2) Perinatal Clerks
10) Medical Assistants

TRIAGE NURSE (RN'S AND LPN'S)

Duties & Tasks

- provide acute care to patients who don't have appointments (walk-ins)
- evaluate how sick a walk-in or call-in patient is
- hand out medicine provided by Cook County

Skills needed to perform Triage Nurse's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask questions to evaluate the severity of patients' needs

READING

materials to be read include:

- patient charts
- dosages, indications, and prescriptions of medicines

reading skills needed include:

- prose reading
- read charts and graphs

WRITING

forms to be written include:

- presciptions
- progress notes
- follow-up care intructions for patients to follow

writing structures and skills:

- fill out forms
- write directions and notes

PROBLEM SOLVING

- determine severity of patients' illness or injury
- prioritize patients in terms of acute care needs
- communicate in a sensitive, empathic manner to people in distress

PEDIATRICS & FAMILY PRACTICE PROVIDERS

Duties and Tasks

- provide general medical care to patients
- maintain progress notes on patients
- request lab work for patients

Skills needed to perform Pediatrics and Family Practice Providers duties and tasks

ORAL (ORAL/AURAL)

language functions include:

- ask questions regarding patients' health
- answer questions patients may have
- explain medical procedures and prescriptions

READING

materials to be read include:

- patient charts
- information on prescription drugs
- medical journals and textbooks

reading skills needed:

- prose reading
- reading charts and graphs

WRITING

materials to be written include:

- progress notes for patient charts
- medical prescriptions

- follow-up care instructions for patients
- referrals

PROBLEM SOLVING

- determine cause of patients' illnesses
- identify appropriate treatment for patients
- communicate in a sensitive, empathic manner to people in distress

NUTRITIONIST

Duties & Tasks

- assess dietary needs of patients
- provide dietary counseling to patients

Skills needed to perform Nutritionist's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask patients about their eating habits
- inform patients about healthy dietary habits

READING

materials to be read include:

- patient charts
- nutrition journals and textbooks

reading skills needed include:

- prose reading
- reading charts and graphs
- reading weights and measures

WRITING

materials to be written inclue:

- progress notes
- dietary instructions for patients

writing skills needed indlude:

- filling out forms and documents
- prose writing

PROBLEM SOLVING

- communicate in a sensitive, empathic manner to people in distress

SOCIAL WORKER

Duties & Tasks

- assess special needs of patients
- provide resources and referrals to patients with special needs
- refer patients to job services, schools, public assistance, housing resources, day care, child support services, substance abuse counselors, transportation resources, counseling, and disability resources

Skills needed to perform Social Worker's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask patients about non-medical needs
- inform patients about resources and referrals

READING

materials to be read include :

- patient charts
- informational brochures and pamphlets
- professional journals

WRITING

materials to be written include:

- patient referrals
- referral locations for patients

PROBLEM SOLVING

- figure out what kinds of services a patient needs
- determine the most appropriate and convenient referral for the patient's needs
- communicate in a sensitive, empathic manner to people in distress

PERINATAL NURSE

Duties & Tasks

- provide medical services to OB patients
- track progress of obstetrics patients
- refer patient to practitioner for post-natal care

Skills needed to perform Perinatal Nurse's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask patients about their health

READING

materials to be read include:

- patients' medical charts
- medical journals and textbooks
- drug and treatment information

reading skills needed include:

- reading prose
- reading charts and graphs
- reading weights and measures

WRITING

materials to be written include:

- patient progress notes
- follow-up care instructions for patients

PROBLEM SOLVING

- assess the health of OB patients
- determine appropriate treatment for patients
- communicate in a sensitive, empathic manner to people in distress

PERINATAL CLERK

Duties and Tasks of Perinatal Clerk

- help Perinatal Nurse track OB patients
- find out why patients miss appointments
- refer low-income OB patients to Women and Infant Care (WIC)

Skills needed to perform Perinatal Nurse's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask patients about their health

READING

materials to be read include:

- patients' medical charts
- medical journals and textbooks
- drug and treatment information
- WIC information

reading skills needed include:

- reading prose
- reading charts and graphs
- reading weights and measures

WRITING

materials to be written include:

- patient progress notes
- follow-up care instructions for patients

PROBLEM SOLVING

- communicate in a sensitive, empathic manner to people in distress

MEDICAL ASSISTANTS

Duties & Tasks

- escort patients into examining rooms
- take and note patients' weight, blood pressure, pulse, and temperature
- find out why patient is visiting clinic
- follow up on lab work and immunizations

Skills needed to perform Medical Assistant's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask patients about their health and reason for visiting clinic
- speak to parents of child patients
- speak to lab technicians to inquire about lab work
- inform medical care providers of why patient is visiting clinic

READING

materials to be read include:

- patients' medical charts
- notes from doctors, lab technicians, or other clinic staff

reading skills needed include:

- reading prose
- reading charts and graphs
- reading weights and measures

WRITING

materials to be written include:

- patient progress notes
- weights and measures of vital signs

PROBLEM SOLVING

- figuring out why the patient is visiting clinic
- make inferences about what patients say to determine what their problem may be
- communicate in a sensitive, empathic manner to people in distress

Laboratory

2) Technicians
2) Phlebotomists

TECHNICIAN

Duties & Tasks:

- run tests on patients per medical care providers' requests
- conduct urine analysis for patients
- send out work to other labs if unable to do it at CMC lab
- keep records of patients seen (date, name, test performed)
- use microscope to analyze blood, urine, etc.

Skills needed to perform Lab Technician's duties & tasks:

ORAL (ORAL/AURAL)

language functions include:

- explain to patients what test they will perform and why
- communicate with medical care providers on what lab work needs to be done
- refer patient to other lab sights when necessary

READING

material to be read includes :

- patient charts
- patient log book
- procedures and instructions for conducting tests

reading skills needed include:

- prose reading
- reading charts and graphs
- reading weights and measures

WRITING

materials to be written include:

- patient progress notes
- information for patient log book

MATH

- measure in cc.'s amounts of blood, urine, or other fluids

PROBLEM SOLVING

- communicate in a sensitive, empathic manner to people in distress

PHLEBOTOMIST

Duties & Tasks:

- run tests on patients per medical care providers' requests
- draw patients' blood
- conduct blood analysis for patients
- send out work to other labs if unable to do it at CMC lab
- keep records of patients seen (date, name, test performed)
- use microscope to analyze blood, urine, etc.

Skills needed to perform Phlebotomist's duties & tasks:

See skills needed to perform Lab Technician's duties & tasks.

Homeless Program

1) Coordinator
1) Clerk
1) Social Worker
1) Medical Assistant
2) Physician Assistants
1) Family Nurse Practitioner
1) Women's Health Nurse Practitioner

COORDINATOR

Duties & Tasks

- manage budget of Homeless Program
- set weekly schedule of medical care team to see patients at 9 homeless shelters
- arrange for back-up if a provider is going to be absent
- maintain contact and communication with directors of homeless shelters

Skills needed to perform Coordinator's duties & tasks:

ORAL (ORAL/AURAL)

language functions include:

- ask homeless shelter directors about their clients
- inform medical care providers of their schedules
- promote health care to homeless shelters

READING

materials to be read include:

- information on homeless shelters
- messages and memos from providers

reading skills needed:

- prose reading
- reading charts and graphs

WRITING

materials to be written include:

- reports on activities of Homeless Program
- memos to providers

- letters and memos to homeless shelter directors

MATH

- allocate dollar amounts to create a balanced budget

PROBLEM SOLVING

- arrange back-up for absent health care providers
- re-figure schedule as needed

CLERK

Duties & Tasks

- compile charts for homeless patients
- enter client data into computer
- complete and record patients' demographic and financial information and medical histories
- translate some data into codes for data purposes
- make sure all patient data and forms are complete and signed
- process billng to public aid office
- translate for patients and medical care providers at homeless shelters

Skills needed to perform Homeless Program Clerk's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask questions about medical history, family history, and demographic information
- contact medical care providers for counter-signature
- translate for Spanish-speaking patients during medical interview at homeless shelters
- answer telephones and take messages

READING/WRITING

materials to be read and written nclude:

- patient information forms
- benefit entitlement forms
- patient charts
- telephone messages

reading and writing skills needed include :

- reading days, times, and names
- filling out forms and documents

MATH

- addition, subtraction and percents to process patient billing

SOCIAL WORKER

Duties & Tasks

- visit homeless shelters to provide resources and referrals to patients with special needs
- assess special needs of patients
- refer patients to job services, schools, public assistence, housing resources, day care, child support services, substance abuse counselors, transportation resources, counseling, and disability resources

Skills needed to perform Homeless Program Social Worker's duties & tasks:

See skills needed to perform Social Workers's duties & tasks. p. 13.

MEDICAL ASSISTANT AND PHYSICIAN ASSISTANT

Duties & Tasks

- visit all 9 homeless shelters to take and note patients' weight, blood pressure, pulse, and temperature
- find out why patient needs to see medical care provider
- follow up on lab work and immunizations

Skills needed to perform Homeless Program Medical and Physician Assistant's duties & tasks:

See skills needed to perform Medical Assistabnt's duties & tasks. p. 16.

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FAMILY AND WOMEN'S HEALTH NURSE PRACTITIONERS

Duties & Tasks

- provide general medical care to patients in homeless shelters
- maintain progress notes on homeless patients
- request lab work and immunizations for patients

Skills needed to perform Homeless Program Medical and Physician Assistant's duties & tasks:

See skills needed to perform Family Practice Provider's duties & tasks. p. 11.

Developmental Disabilities

1) Director
1) Office Manager
2) Office Clerks
6) Case Coordinators

OFFICE MANAGER AND CLERKS

Duties & Tasks

- process billing
- report to director of department
- enter client data on computerized data base
- answer telephones
- screen potential clients
- maintain contact with provider network
- maintain files and case load listing

Skills needed to perform DD Program Office Manager and Clerks duties & tasks:

ORAL (ORAL/AURAL)

language functions include:

- ask questions about medical history, family history, and demographic information
- contact case coordinators about potential clients
- answer telephones and take messages

READING/WRITING

materials to be read and written nclude:

- patient information forms
- benefit entitlement forms
- patient charts
- telephone messages

reading and writing skills needed include :

- reading days, times, and names
- filling out forms and documents

MATH

- addition, subtraction and percents to process patient billing

CASE COORDINATOR

Duties & Tasks

- assess special needs of clients with mental retardation, cerebral palsy, epilepsy, autism, and other similar conditions
- provide resources and referrals to clients with special needs
- refer clients to educational resources, residential placement, transportation services, and other needs
- monitor clients in development training which provides: housekeeping, daily living, sorting, counting money, public transportation, bathing, signs of danger, etc.
- follow-up on referrals
- conduct site visits to monitor clients
- attend conferences to gain more information and resources
- observe clients' home settings to fully assess needs
- work with and assist families in crisis
- handle emergency situations effectively and professionally
- assess client progress

Skills needed to perform Case Coordinator's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- ask clients about developmental needs
- inform clients about resources and referrals
- contact referred agencies for information and follow-up

READING

materials to be read include :

- client files
- informational brochures and pamphlets
- professional journals

WRITING

materials to be written include:

- client referrals

- referral locations for clients

PROBLEM SOLVING

- figure out what kinds of services a client and client's family needs
- determine the most appropriate and convenient referral for the client's needs
- communicate in a sensitive, empathic manner to people in distress

Financial Department

11) Accounts Receivable Clerks
2) Accounts Payable Clerks
2) Payroll Clerks
1) Bookkeeper
6) Data Entry Clerks

ACCOUNTS RECEIVABLE (BILLING & COLLECTION)

Duties & Tasks

- assess what is owed by reviewing "encounters"
- call patients on the telephone to request payment
- send letters to patients as follow-up to phone calls
- visit clinic sites to track down delinquent patients
- review and process Medicaid and Medicare bills

Skills needed to perform collector's and biller's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- itemize medical bill over the phone to patients
- explain to patient why it's important for him/her to pay the bill

READING

materials to be read include :

- procedures and dollar amounts on "encounter"
- Medicaid and Medicare forms for children and adults
- CPT codes

WRITING

materials to be written include:

- follow-up letters requesting payment

MATH

- reading and saying dollar amounts on bills

PROBLEM SOLVING

- determining identity of Medicaid patients on claims
- coaxing patients to pay their bills in whole or in part

ACCOUNTS PAYABLE

Duties & Tasks

- verify invoices of items ordered by CMC; eg. office supplies, medical supplies, laboratory supplies, maintanance expenses
- examine purchase orders and their back-up; eg. requisition form, job ad, packing slip
- type up payment checks and file 2 copies
- send checks to department head for signing and mailing
- make and maintain copies of invoices, checks, and back-up

Skills needed to perform Accounts Payable clerk's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- communicate with CMC departments to make sure items were received
- call vendors if back-up is missing
- communicate with vendors in the event of a dispute

READING

materials to be read include :

- invoices, packing slips, requisition forms, etc.

WRITING

materials to be written include:

- fill out accounts payable vouchers
- write a payment code on all invoices
- write out checks

MATH

- reading and writing dollar amounts on bills
- write out dollar amounts on checks

PROBLEM SOLVING

- making sure that CMC ordered and received items billed for

PAYROLL CLERK

Duties & Tasks

- figure and process paychecks of 180 employees every 2 weeks
- enter payroll information on database
- inform supervisors of changes in payroll information

Skills needed to perform payroll clerk's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- communicate with supervisors to find out about changes in payroll

READING

materials to be read include :

- time cards
- tax forms
- checkstubs

WRITING

materials to be written include:

- paychecks and stubs

MATH

- figure percentages of taxes and other deductions
- total paycheck amounts correctly and accurately

BOOKKEEPER

Duties & Tasks

- be responsible for billing for Homeless and DD programs
- copy checks from insurance companies
- log cash receipts into book
- reconcile bank statements and balance
- process refunds to insurance companies
- collect financial information from all programs and record
- maintain account ledgers for all CMC programs and departments

Skills needed to perform bookkeeper's duties & tasks

ORAL (ORAL/AURAL)

language functions include:

- communicate with bank in case of error or problem
- communicate with all CMC departments for their financial information

READING

materials to be read include :

- bills and statements from vendors, bank, and insurance companies
- balance sheets

WRITING

materials to be written include:

- log entries
- checks to pay vendors' bills

MATH

- reading dollar amounts on bills
- reviewing bill amounts for accuracy

PROBLEM SOLVING

- find out reason that books may not be balanced
- make sure programs do not overspend their accounts

DATA ENTRY CLERK

Duties & Tasks

- enter patient code, date of service, and amount received from public aid to pay for specific procedures on data base
- enter invoices and payment information for accounts payable

Skills needed to perform data entry clerks duties & tasks

READING

materials to be read include :

- encounters, Medicare and Medicaid forms, invoices, copies of checks
- computer screen

WRITING

materials to be written include:

- notes on problems with computers
- notes on incomplete information

PROBLEM SOLVING

- deal with computer-related problems